

WEB-BASED MANAGED CARE SYSTEM HAVING A  
COMMON ADMINISTRATIVE ACCOUNT

BACKGROUND OF THE INVENTION

5    **Technical Field**

The present invention relates generally to a system for providing web-based data collection and management in a managed care organization.

10    **Description of the Related Art**

15    The business processes currently in place in almost all managed care organizations (MCO) are needlessly complex and inefficient, requiring a great deal of manual labor and resultant expense. Figure 1 shows a simple example illustrating such inefficiencies. This drawing illustrates how the key constituents (members 100, employers 102 and providers 104) now carry out the simple task of making an inquiry to the MCO. As illustrated, the MCO typically provides or uses a member services call center 106, an account service call center 108, and a provider service call center 110. Data queries generated from the member services call center 106 are processed by a member services database 107, while data queries generated from account services and provider services are processed by the account service database 109 and provider service database 111. When a member 100, an employer 102 or a provider 104 desires to make an inquiry, he or she typically accesses the MCO via a telephone 115, and requested information 117 is usually returned by mail

118. Another example of the inefficiencies inherent in the current system is shown in Figure 2, which illustrates how an employee 200 enrolls in his or her employer's managed care program. In this example, the employee 200 fills out enrollment forms 202, which are then forwarded on to the employer's HR department 204. The HR department 204 enters such data into the employer's information system 206 and then forwards the information via regular mail to the managed care organization 208. The MCO then has to enter the data in its information system 210. Such processes are time consuming and inefficient.

In addition to the structural and administrative problems inherent in the existing MCO industry, several major trends are now emerging in the health care industry as a whole. Employers are taking a less active role in the payment of and administration of health care benefits. The use of global, interconnected computer systems, such as the Internet, have become commonplace and inexpensive. Moreover, new standards, systems and processes for the health care industry infrastructure have begun to be proposed and implemented. Finally, there has been significantly increased demand by consumers for health-related information. Indeed, consumers are becoming more educated and participatory in clinical decision making and are demanding more from physicians.

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The Internet has been a major catalyst for change. It is  
estimated that there are now over 65 million U.S. adults with  
access to the Internet, which represents over 25% of the  
population. The Internet is rapidly becoming the most important  
5 communications channel for health plans, and many companies have  
begun to provide health care-related services online. Healtheon  
Corporation provides software and services that enable healthcare  
information, both medical and administrative, to be exchanged  
over the Internet. The company provides a system to automate  
10 such tasks as HMO enrollment, referrals, data retrieval, and  
claims processing for use by insurers, doctors, pharmacies, and  
consumers. Healtheon, through WebMD, also provides Internet-  
based technology that connects physicians, hospitals, payors, and  
consumers to an array of interactive tools and services. Other  
15 companies are deploying solutions as application services.

Alteer, for example, is an application service provider (ASP)  
that provides a web-based workflow solution to address  
administrative and communication needs of healthcare  
professionals and consumers. Alteer establishes healthcare  
20 professionals' practices as online healthcare portals. As a  
result, patients can visit the respective physician web sites and  
search for information specific to their physician's expertise  
and their personal needs. Other companies now provide online  
solutions for managing patient information access, contract

compliance and billing, and clinical performance analysis. Still others provide online solutions that allow physicians to manage their clinical information and secure access to the same information by patients so that patients can actively participate in their personal family health management.

Currently, every constituent of the health care system collects a set of data that is likely to be somewhat different from one party to another. This is manifested in a health care record that is collectively strewn across the health care landscape in various multiple enterprises. The present effort of collecting each element of the data requires that the data set be as small as possible, containing only essential information. The ability to share information, such as submitting a claim to a managed care organization or authorizing a visit to a specialist, is difficult because no party can ensure that they are matching records on the same individual.

It would be desirable to be able to leverage the Internet to allow loosely-related parties to share a common set of data, with one common identification number, allowing what was previously disparate data to become meaningful, actionable information.

## BRIEF SUMMARY OF THE INVENTION

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The present invention is a web-based system for collecting and managing administrative details of a member in a managed care organization. The system collects and makes available over the Internet to all concerned parties digital information that can be selectively retrieved, viewed and managed by all authorized participants. This information, for example, includes the personal demographic details concerning the member and their eligible dependents, their plan elections and preferences, and their benefits usage history. The aggregated information is stored in a central database, using a "member account" paradigm. The member supplies the base information for the member account at initial enrollment in a health plan, either directly through the Internet or through an interface to their employer's human resources data system. Such information is then available to be shared via the Internet with a health provider, new employer or health insurance plan, or for the member themselves. Historical information about expenditures, usage, payments, and the like, can then be added to the record as experienced, allowing a greater ability to derive value from the contained information.

The data set which results from the present invention substantially reduces the amount of manual record-keeping that is required for each participant, while increasing data accuracy. The invention dramatically lowers administrative costs for every

user of the system. In addition, data captured in the system is richer than that which is currently owned by any one party, enabling new forms of value through reporting and data extraction. The invention allows the user (whether  
5 member/patient/employee) to access their personal healthcare administrative record and use that information to increase their control over their healthcare experience. The account is portable, meaning that it will support a member's move to other employers or other health plans.

10 The foregoing has outlined some of the more pertinent objects and features of the present invention. These objects and features should be construed to be merely illustrative of some of the more prominent features and applications of the invention. Many other beneficial results can be attained by applying the  
15 disclosed invention in a different manner or modifying the invention as will be described. Accordingly, other objects and a fuller understanding of the invention may be had by referring to the following Detailed Description of the Preferred Embodiment.

## BRIEF DESCRIPTION OF THE DRAWINGS

For a more complete understanding of the present invention and the advantages thereof, reference should be made to the following Detailed Description taken in connection with the accompanying drawings in which:

Figure 1 illustrates how members, employers and providers obtain inquiries from existing MCO online systems;

Figure 2 illustrates a conventional MCO enrollment process;

Figure 3 illustrates a web-based managed care system having a common administrative account according to the present invention;

Figure 4 illustrates representative screen displays and process flow for a member enrollment function in the web-based managed care system of the invention;

Figure 5 illustrative representative screen displays and process flow for an employer enrollment function in the inventive system;

Figure 6 illustrates representative screen displays and process flow for a Primary Care Physician (PCP) selection function according to the invention;

Figure 7 illustrates representative screen displays and process flow for a benefits inquiry according to the invention;

Figure 8 illustrates representative screen displays and process flow for downloading static pages in the system;

Figure 9 illustrates representative screen displays and process flow for a member re-enrollment function;

5 Figure 10 illustrates representative screen displays and process flow for a PCP change function;

Figure 11 illustrates representative screen displays and process flow for a Provider Directory inquiry function;

10 Figure 12 illustrates representative screen displays and process flow for Member Information Change function; and

Figure 13 is a data entity diagram illustrating the tables that comprise the member administrative account according to the present invention.

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## DETAILED DESCRIPTION OF THE PREFERRED EMBODIMENT

Familiarity with the MCO business model is presumed in the following discussion. As is well-known, a member is a subscriber or a subscriber's dependent if the MCO accepts risk. A subscriber is an employee who is eligible and elects coverage. An employer identifies the employer entity, typically a corporation that has a contract with a health organization to provide services to its employees. The MCO is the managed care organization entity.

This is the healthcare organization that is contracting with an employer entity to provide service to the employer's employees.

In an illustrated embodiment, a web-based transaction server is operated at a web site accessible over the Internet. In addition, the managed care organization (MCO) may operate a web-based transaction server (sometimes referred to herein as the MCO server or site). Typically, a user (either a member, employer, or provider) will navigate first to the MCO server and then be redirected to the transaction server, although this is not required. This configuration, of course, is merely exemplary and should not be taken to limit the present invention.

Generalizing, the invention may be practiced in any convenient server or set of servers accessible over a computer network from a client machine having a web browser or other graphics viewer. Preferably, an available resource (a document, page, object or the like) is identified by a Uniform Resource

Locator (URL) that can be accessed by an authenticated user. The computer network may be the Internet, an intranet, a virtual private network, or the like. Generalizing, a server used in the present invention may be a Web Application Server (WAS), a server application, a servlet process or the like. Through the standard Hypertext Transfer Protocol (HTTP), a client browser accesses the HTTP-enabled server to obtain access to the resource. As is well-known, most browsers provide security through the Transport Layer Security (TLS) protocol. This protocol allows both the browser and the WAS to authenticate each other (i.e. to prove their identity to each other), and it also provides data protection (data integrity and data confidentiality) for data in transit between them. The strongest form of authentication provided by the TLS/SSL protocol is client- and server-side certificate authentication. Such authentication requires the client (the browser) and the server (the WAS) to each have a private/public cryptographic key pair, and associated certificates. Public key authentication maintains a binding between a user's identity and a public key that can only be unlocked by the associated private key. In an illustrative embodiment of the present invention, a client browser and a WAS implement these protocols to provide mutual authentication. Thus, the invention provides secure web-based access to protected

member data which, as described below, is maintained within a novel administrative account structure.

Figure 3 illustrates the web-based managed care system 300 having a common administrative account according to the present invention. Users of the system include members, employers, and others. The system 300 comprises a web server 302 to which users connect over a computer network 304 in a conventional manner using a client machine 306 having a web browser 308. As noted above, the network 304 is the public Internet, a corporate intranet, a private virtual network, a web content delivery service, or the like. The web server is identified by a publicly-available second level domain name. The system 300 includes a web-based subsystem 310 comprising multiplexer 312, and a set of functional modules including enrollment 314, billing 316, messaging 318, and inquiry 320. Each module interfaces to a transaction processor 322 and a database 324. The transaction subsystem interfaces to the managed care organization (MCO) subsystem 330 through a set of common XML-based interfaces 326 and 328. The MCO subsystem 330 is accessible through an MCO server 332 and includes a transaction processor 334 and a backend database 336.

Each of the functional modules is accessible via a web browser. Collectively, these modules comprise an administrative toolset that leverages off-the-shelf technology to fundamentally

change how these administrative processes are carried out in a managed care organization. In an illustrative embodiment, the enrollment module 314 enables members, employers and providers to enroll, re-enroll, and to view enrollment information. More specifically, the enrollment module provides the following major functions: group account setup, eligible employee roster upload, member enrollment and changes, employer validation, notification, reporting, online help, and temporary ID card provisioning.

The billing module 316 enables online billing and payment, and facilitates claims matching. By leveraging the information about who is enrolled through the use of a roster which is shared between the employer and the plan, a great deal of manual work can be eliminated. Currently, each party must reconcile their rosters to the other's manually. The billing module allows the importation of a roster file from either party, and execution of a "compare roster" function within the module reports on any differences between the two. The shared roster leads to more accurate bills. In particular, the bill is presented via the secure messaging module 318, eliminating time and postal waste. The bill, which is preferably presented via XML, includes "drill down" capability for detail inquiries, and an Electronic Funds Transfer component to facilitate immediate payment.

The messaging module 318 provides secure messaging among the various parties to enable referrals, authorizations, reporting

and the like. The use of electronic communication by non-secure means such as standard e-mail is rising, and Health Insurance Portability and Accountability Act of 1996 (HIPAA) guidelines will require a more robust solution. The messaging module allows users to communicate with other selected parties in their personal healthcare network, such as a patient to their Primary Care Physician, a PCP referring to a specialist, or from any constituent to the MCO. The recipient is notified that a secure communication is waiting to be read on the host server, and only after a secure sign-on process (where the user is identified) can he or she read that information. The message preferably is never exposed to non-secured channels.

The inquiry module 320 provides a mechanism for provider database lookup, viewing of enrollment information, and the like. This module provides a solution to one of the biggest sources of constituent frustration in the healthcare industry- the ability to easily get answers to questions. The inquiry module provides a self-service solution for the user to find the answers they need to the most common types of questions: Claims Status, Eligibility and Benefits Inquiry, Provider Network information, and access to FAQ documents that are custom tailored by the application for that particular user. In a preferred implementation, each module uses Common Gateway Interface (CGI) fill-in forms or active

server pages (.asp) to obtain data that is managed by the system, as will be seen.

Figure 4 illustrates the representative screen displays and process flow for a typical member enrollment. This functionality is provided by the administrative toolset and, in particular, by the enrollment module 314. The process begins when the user navigates to the MCO home page 400 hosted on web server 332.

When the user selects the Enroll Now link, the user is redirected to the enrollment page 402 hosted on web server 302. To enroll, the user selects the login link, which opens the browser to an enrollment overview page 404 describing an overview of the enrollment process and the information that the user will need to provide to complete the enrollment process. Upon selection of the Next link, the browser opens up an Employer ID# page 406. This page requires entry of an Employer ID and Division ID provided to the user by the employer. Upon entry of this information, the user selects the Next link, which opens a Choose Coverage Type page 408. This page identifies the possible coverage types (e.g., individual, 2 person, family, or the like) that are available from the MCO. Each coverage type is a hypertext link. Selection of one of the links (in the case, the Individual link) opens the browser to Coverage Information page 410, which describes the relevant coverage. When the user selects the Next button, the browser returns to the Choose Coverage Type page 408.

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If the user selects the Next button from the Choose Coverage page 408, the browser opens a Subscriber Information page 412, which includes a fill-in form requesting personal details about the subscriber including, for example, name, title, address, telephone, fax, email, etc. The form also requests the user to identify whether he or she is covered under another health plan. If so, the plan benefits will need to be coordinated if they are not already. Thus, once the form is filled-in and the user selects the Next button, a test 414 is executed to determine whether the user is covered by another plan but the system has not coordinated benefits. If the outcome of the test at step 414 is positive, the browser opens up a Coordination of Benefits page 416, which requests the user to identify his or her other plan by name and plan subscriber. The user then selects the Next button, which executes a test at step 418 to determine whether the plan subscriber is a subscriber to the MCO plan or, alternatively, a family member. If the outcome of the test at step 418 indicates that the plan subscriber is the subscriber, the browser navigates back to the Subscriber Information page 412. If, however, the test at step 418 indicates that the plan subscriber is a family member, the browser is directed to a Family Member Information page 422 as will be described below.

If the outcome of the test at step 414 is negative, however, the user is navigated to a Family Summary page 420. This page

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lists each member of the MCO subscriber's family. By selecting a Details button next to each name, the user can navigate to a Member Details page 424 and then return back to the Family Summary page 420. By selecting a Change Button in page 420, the user is navigated back to the Subscriber Information page 412. By selecting a Remove Button in page 420, the browser opens up a pop-up window 426 requesting confirmation. A test 428 is then run to determine whether a person is to be removed. If so, the browser returns to the Family Summary page 420 with the selected person removed. If, however, the outcome of the test at step 428 is negative, the browser returns to the Family Summary page 420 without change.

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The user may select the Add Another Family Member button in page 420, which opens the browser to the Family Member Information page 422. This page requests relevant information such as name, title, address, telephone, fax, email, DOB, SSN, relationship, primary language, and the like. As noted above, this page is also reached from the test at step 418. The Family Member Information page also questions whether the member is covered under another plan and if the member is a full-time student over 18. When the user selects the Next button on page 422, a test is run at step 430 to determine whether the coordination of benefits box was checked and not filled in. If so, the browser returns the Coordination of Benefits page 416,



which has been previously described. If, however, the outcome of the test at step 430 is negative, a test is executed at step 432 to determine if the student button was selected and not filled in. If not, the browser returns to the Family Summary page 420.

5 If, however, the outcome of the test at step 432 is positive, the browser navigates to the Enter Student Info page 434 so that data (e.g. school name, city, etc.) can be collected. From Enter Student Info page 434, selection of the Next button returns the browser to the Family Summary page 420.

10 When the user selects the Complete button on the Family Summary page 420, the browser returns a Choose a Plan page 436. This page identifies specific plan types (e.g., HMO, PPO, or the like), each of which is identified by a hypertext link. When the user selects a plan link, the browser opens up the appropriate description page, in this case the HMO Plan Information page 438.

15 If the user selects the Next button from the Choose a Plan page 436, a test is performed at step 440 to determine whether the selected plan requires a Primary Care Physician (PCP) selection. If so, the browser navigates to PCP Selection page 442. This

20 page enables each family member to select a given PCP or, using a Select All button, to force each family member's PCP to be the same as the subscribers. If the Select PCP button is selected, the browser navigates to a PCP search page 444, which is described in more detail below. When the user selects the Next

button from the PCP Selection page 442, or upon a negative outcome of the test at step 440, the browser opens a Disclaimer page 446 setting forth the legal terms and conditions for enrollment. If the user selects the "I Agree" button, the browser navigates to a Thank You page 448. If the user selects the "I Disagree" button, the browser navigates to an Are you sure page 450 requesting whether the user desires to cancel enrollment. From the Thank you page 448, the user can print an Enrollment Confirmation page 452 or return to the MCO home page. This completes the enrollment process.

Figure 5 illustrates a representative employer enrollment process. In this case, the user navigates to the MCO home page 500 and selects the Enroll Now button. This navigates the user's browser to the system employer login page 502. By selecting the Login button, the user navigates to the Employer Main Menu page 504. Selection of the View Roster button returns a View Current Roster page 506, which identifies the current employees of the company. By selecting a Details button next to each name, the browser navigates to an Enrollee Details page 508, which identifies the employee and his or her family member data. By selecting a Click to Download button on page 506, the browser returns a Download Current Roster page 510, which includes appropriate roster links as shown. From the Verify New Enrollee button in page 504, the browser navigates to an Approve or Deny

New Enrollee page 512. From that page, the user can verify that an identified enrollee is eligible for the plan by highlighting an entry and selecting the Submit button. After all entries are checked, as determined by a positive outcome of the test at step 514, control routines the browser to the Employer Main Menu page 504. The user can then logoff or perform other tasks.

Figure 6 illustrates a representative PCP Selection process, which can occur from enrollment, re-enrollment or PCP Change processes. From the PCP Selection page 600, the user navigates to the Search for a Physician page 602. The user can fill in parameters such as name, address, gender, language, hospital affiliation, medical group affiliation, type of plan, specialty, and the like. After selecting the Submit button, the search engine returns a Search Results page 604, which identifies one or more matching selections based on the search criteria. A test is then performed at step 606 to determine whether the PCP's Panel is open for additional patients. If not, a Search Results page 608 is returned to the user indicating that the physician cannot accept additional patients and requesting selection of another physician. If the outcome of the test at step 606 is positive, however, the Search Results page 610 is returned identifying the particular physician.

Figure 7 illustrates a representative operation of the benefits inquiry module. The routine begins when the user

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5 navigates to the MCO home page 700. A user can select the Members button, the Employers button or the Providers button. Depending on the button selected, the user is navigated to the appropriate login page 702 of the system. Upon selection of the Login button, an Account page 704 is returned to the browser. Selection of a Benefits Coverage Inquiry button returns a Patient Search page 706. Following entry of the requested information and selection of the Submit button, a Search Results page 708 is returned if the member is found. This page identifies the member, the provider, co-pay information and other coverage details. If the member cannot be found, another Patient Search page 710 is returned. If the member cannot be located after a given number of attempts, a Patient Search page 712 is returned indicating that the patient could not be located given the search criteria entered. This completes the benefits inquiry process. A similar functionality is provided to inquire about a given provider.

20 Figure 8 illustrates the process flow and display screens for downloading static pages. This function may also be provided by the inquiry module. The routine begins with the user navigating to the MCO home page 800 and then to the system login page 802. Upon login, the Account page 804 is returned. Upon selection of the Printed Materials button, the routine tests to identify what document has been selected from the access database

806. An appropriate Document Listing Page 808 is then returned to the browser. Once the user selects the document to be printed, the browser retrieves the appropriate HTML form 810. A read-only version 812, e.g., in .pdf format, may be retrieved by selecting a button in the HTML page.

Figure 9 illustrates screen displays and illustrative process flow for a member re-enrollment function. The routine begins with the user navigating to the MCO home page 900 and then to the system login page 902. Upon login, the Account page 904 is returned. Upon selection of the Re-enroll button, the Subscriber Information page 912 is returned. From this point forward, the enrollment functionality is similar described above with respect to the screens that are common to Figure 4.

Figure 10 illustrates screen displays and illustrative process flow for a PCP change function. The routine begins with the user navigating to the MCO home page 1000, to the system login page 1002, and then to the Account page 1004. From this screen, the user selects a Change a PCP button. As a result, the PCP Selection page 1006 is returned. This function was described previously in Figure 4.

Figure 11 illustrates screen displays and illustrative process flow for a Provider Directory inquiry. The routine begins with the user navigating to the MCO home page 1100, to the system login page 1102, and then to the Account page 1104. Upon

selection of a Search Provider Directory button, the browser navigates to a Search For A Physician page 1106. This functionality was described above in Figure 6.

5 Figure 12 illustrates screen displays and illustrative process flow for a Member Information Change function. The routine begins with the user navigating to the MCO home page 1200, to the system login page 1202, and then to the Account page 1204. Upon selection of an Update My Information button, the browser navigates to a Family Summary page 1206. This page was previously described in Figure 4. If the Add Another Family Member button is selected, a test is run at step 1208 to determine if the change happens during an open enrollment period. If so, the browser returns the Member Information page 1210 as previously described in Figure 4. If, however, the outcome of the test at step 1208 is negative, the browser returns a Qualifying Event page 1212, which indicates that the user has requested a change outside of his or her open enrollment period. In such case, the user selects the appropriate Qualifying Condition button, and the browser returns an Affidavit page 1214  
20 to allow the change to be processed.

According to a feature of the present invention, a novel account structure is used to manage administrative transactions (e.g., enrollment, changes, inquiries, claims, benefits, etc.) across multiple plans. The account comprises a linked set of

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data tables that are organized into a logical entity in a database stored in memory or permanent storage. The database is then accessible to the web-based managed care transaction system. As a user moves from one job to another, or as a given plan is changed or replaced, the user's past history remains persistent and accessible from the account. Thus, the account provides a complete member history that is persistent across plan changes, employment changes, family history changes, and the like. The account allows members the opportunity to review and manage the many aspects of their personal care through a web browser. As will be seen, the account includes a record of the member's healthcare benefits throughout their life.

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The account, called ACCOUNT in an illustrative embodiment, is shown in the data entity relationship diagram of Figure 13. Each block in this diagram is a table that includes a number of attributes. A particular table may have a 1:1 or a 1:many relationship to another table. Thus, for example, the master account (ACCOUNT table 1300) has a 1:1 relationship to the MEMBER table 1302 because each account has only one member associated therewith. The MEMBER table 1302 has a 1:many relationship with MEMBER HISTORY table 1304 as a given member may have a history of involvement with more than one health plan.

Each of the tables is described generally below:

ADDRESS USER 1306 -- is the generic address participation matrix identifying a user type (members, PCPs, employers) to possible purposes (home, work, mailing, billing, etc.);

5 ASSIGNED PCP 1308 -- is the selected Primary Care Physician for a member enrollment period;

CLAIMS INFO 1310 -- includes all claims-related information;

COORD BENEFIT 1312 -- identifies the coordination benefits for the member;

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10 DIGITAL ADDRESS 1314 -- identifies the electronic and/or digital contacts for an individual;

EMPLOYER 1316 -- identifies the employer entity, typically a corporation that has a contract with a health organization to provide services to its employees;

15 EMPLOYER PLAN 1318 -- identifies the various plans that the Employer group has contracted with an MCO. The data includes Group Number, Division Number, Employer Plan ID, and a selected MCO Product/Plan is part of the designated health plan offering to the employee;

20 EMPLOYER STAFF 1320 -- identifies what users of the Employer group are allowed access to the system via an account setup process;

ACCOUNT 1300 -- is the account setup information that contains userID/password and helpful things to login and use the secured site;



LOOKUP 1322 -- is a lookup table for allowable values for a table/column\_lookup\_key combination in the schema;

HOSPITAL AFFILIATION 1324 -- is a table that identifies all hospital affiliations associated for this particular provider;

5 MCO 1326 -- is the managed care organization entity. This is the healthcare organization that is contracting with an Employer Entity, thus providing service to the Employer's employees;

MCO PRODUCT 1328 -- is a table listing plans or products that are provided by a health care organization;

10 MCO STAFF 1330 -- is a table that identifies what users of the managed healthcare group are allowed access to the system via the account setup process;

MEMBER 1302 -- is a table that identifies personal data for each member;

15 MEMBER HISTORY 1304 -- is a table that describes the participation history of a member. This table identifies the relationship and history of what healthcare plan the member has enrolled in all companies for which he or she worked;

20 MEMBER STUDENT 1332 -- is a table identifying information about the school and location if the member is a fulltime student;

ORG INFO 1334 -- is a table that is relevant if the provider in the PROVIDER INFO table is identified as an organization provider;

PHYSICAL ADDRESS 1336 -- is a table identifying actual physical addresses that can be associated to anyone or any corporation;

PROVIDER AFFILIATION 1338 -- is a table that provides the intersection information of a provider practicing what allowable specialties at a practice site;

PROVIDER INFO 1340 -- is a table describing the provider selected by the member;

PROVIDER LANG 1342 -- identifies all languages in which this provider can communicate with his or her patient;

PROVIDER SPECIALTY 1344 -- identifies all specialties practiced by this provider;

PROVIDER STAFF 1346 -- identifies all staff members to a particular provider who require access to the system via the account setup process;

SITE SPECIALTY 1348 -- is an intersection table to show a provider's specialties that are practiced at a particular site;

STAGING AREA 1350 -- is a table that tracks the process of a member through the system for various transaction events, e.g., enrollment, profile change, or the like;

STAGING AUDIT 1352 -- is an audit log for a specific record;

STAGING DIGITAL ADDR 1354 -- is a table that contains other digital addresses that are related to this particular Staging Area record; and

STAGING PHYSICAL ADDR 1356 -- is a table that contains other physical addresses that are related to this particular Staging Area record.

The following is a detailed Data Dictionary for each of the 5 above tables, with each attribute identified by name and description.

Entity Name	Entity Description	Attribute Name	Attribute Description	PK	Req	FK
ADDRESS USER	This is the generic Address participation matrix identifying a user type (members, pcp's, employers) to possible purposes (home, work, mailing, billing, etc.).	Purpose Cd	This identifies the purpose of this address; such as: "1. PR = Practice Address" "2. HM = Home Address" "3. BL = Billing Address" "4. ML = Mailing Address" "5. WK = Work Address"	No	Yes	No
		User Cd	The identifies the user types of this address matrix. Supported types may include: "1. MEM = Member " "2. MCO = MCO " "3. EMP = Employer Group" "4. PPS = Provider Practice Site"	No	Yes	No
		Digital Address Key	Unique type identifier of digital address.	No	No	Yes
		Employer Key	Unique lookup key that identifies this employer coverage based on a contract number with a MCO.	No	No	Yes
		MCO Key	Unique managed care identifier key.	No	No	Yes
		Member Key	This identifies a unique Member; currently based on Social Security Number and Date-Of-Birth.	No	No	Yes

		Physical Address Key	Unique record identifier of this address.	No	No	Yes
		Practice Site Key	This key uniquely identifies a practice site for a provider. This practice details the MCO product that is provided by this doctor.	No	No	Yes
		AMI Addr Who	This is a placeholder attribute used by the AMISYS source load group.	No	No	No
ASSIGNED PCP	This is the selected Primary Care Physician for a member enrollment period.	History Key	This is a unique reference key to a specific member working for a specific employer enrolled in a specific plan for a specific enrollment period. Basically, add Start Date, Coverage Type, Group/Division Id, and Employer Plan Id to the specified list of foreign keys.	No	Yes	Yes
		Practice Site Key	This key uniquely identifies a practice site for a provider. This practice details the MCO product that is provided by this doctor.	No	Yes	Yes
		First Name	Provider's first name	No	Yes	No
		Last Name	Provider's last name.	No	Yes	No
		Start Date	Start date of this PCP for this member's span.	No	Yes	No
		Provider Num	A provider number recognized by a particular MCO. For example, this relates to the PROV# field in AMISYS.	No	No	No
		Site Cd	A term identifying the Site Code of the group practice that	No	No	No

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			the physician belongs to.			
CLAIMS INFO	FUTURE... A generic cut at all relevant claims related information.	Claims Reference Key		Yes	Yes	No
		Site Specialty Key	A unique identifier based on all of a provider's specialties at this site.	No	Yes	Yes
		Member Key		No	Yes	No
		Affiliation Fund Amt		No	No	No
		Attending Local Risk Unit		No	No	No
		Attending Provider Key		No	No	No
		Attending Sub Risk Unit		No	No	No
		Authorization Num		No	No	No
		Billed Amt		No	No	No
		Claim Adjustment Amt		No	No	No
		Claim Payment Date		No	No	No
		Claim Status		No	No	No
		Claim Type Cd		No	No	No
		Coinsurance Amt		No	No	No
		Copay Amt		No	No	No
		Deductible Amt		No	No	No
		Diagnosis 1 Service Line		No	No	No
		Diagnosis 2 Service Line		No	No	No
		Discharge Status		No	No	No
		Fee For Service Amt		No	No	No
		Financial Service Type		No	No	No
		ICD 9 Num		No	No	No
		Medicare Payment Amt		No	No	No
		Paid Amt		No	No	No

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		PCP Local Risk Unit		No	No	No
		PCP Provider Key		No	No	No
		PCP Sub Risk Unit		No	No	No
		Pool Name		No	No	No
		Primary Insurance Cd		No	No	No
		Procedure Desc		No	No	No
		Referring Local Risk Unit		No	No	No
		Referring Provider Key		No	No	No
		Referring Sub Risk Unit		No	No	No
		Risk Withheld Amt		No	No	No
		Service End Date		No	No	No
		Service Start Date		No	No	No
		Servicing Local Risk Unit		No	No	No
		Servicing Provider Key		No	No	No
		Servicing Sub Risk Unit		No	No	No
		TPP Amt		No	No	No
COORD BENEFIT	This is the coordination of benefits for the member. Shared cost to another insurance group	History Key	This is a unique reference key to a specific member working for a specific employer enrolled in a specific plan for a specific enrollment period. Basically, add Start Date, Coverage Type, Group/Division Id, and Employer Plan Id to the specified list of foreign keys.	No	Yes	Yes
		Start Date	Start date of this COB coverage.	No	Yes	No
		Birthdate	Birthday of the associated subscriber providing this	No	No	No

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			additional coverage term.			
		Carrier Name	Name of the additional insurance coverage provider.	No	No	No
		Coverage Type	The coverage type of this policy; i.e. Self, Spouse, Dependents, Medicare, Medical, Dental, etc.	No	No	No
		Effective Date	The effective date of this secondary policy.	No	No	No
		First Name	First name of subscriber to this secondary policy/plan.	No	No	No
		Last Name	Last name of associated subscriber to this additional plan.	No	No	No
		Policy Num	Insurance policy number for this coordinate benefit.	No	No	No
DIGITAL ADDRESS	This is the electronic and/or digital contacts for an individual.	Digital Address Key	Unique type identifier of digital address.	Yes	Yes	No
		Type Cd	This code defined the various types: "1. VC = Voice/Land phone" "2. CL = Cell phone" "3. PG = Pager" "4. EM = Email" "5. WB = Web HomePage"	No	Yes	No
		Valuel	Contains initial value associated with a type of digital address. For example - voice mail includes: 800.555.1212 or abc@foobar.com for Email type.	No	Yes	No

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		Value2	This may be a second value set to a specific type of digital address. For example - voice mail may include an extension part to the original phone number.	No	No	No
		Value3	This third value association is for obscure elements like answer back string to a modem connect and/or future electronic requirements.	No	No	No
EMPLOYER	This is an employer entity; it identifies an corporation (i.e. General Electric) that has a contract with a health organization to provide services to its employees.	Employer Key	Unique lookup key that identifies this employer coverage based on a contract number with a MCO.	Yes	Yes	No
		Company Name	Name of an Employer contracting with a MCO for services for its employees. For example, General Electric.	No	Yes	No
		Logo1 URL	Location of primary employer graphical logo.	No	No	No
		Logo2 URL	Location of secondary employer graphical logo.	No	No	No
EMPLOYER PLAN	This identifies the various plans that the Employer group have contracted with a MCO. Group number, Division number, Employer Plan id, and a selected MCO Product/Plan is part of the designated health plan offering to the employee.	Employer Plan Key	This uniquely identifies a particular plan that an Employer Group is providing for its employees.	Yes	Yes	No

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		Employer Key	Unique lookup key that identifies this employer coverage based on a contract number with a MCO.	No	Yes	Yes
		Participation Key	This identifies a specific product that a health care organization will provide for service to any employer groups.	No	Yes	Yes
		Employer Plan Id	This is the employer plan id; it should uniquely identify the Employer to a Contract Id for a certain SubGroup(Group/Division) that it expect healthcare coverage from a MCO. This identifier will be a generated value; format = TBD.	No	Yes	No
		Sub Group Id	This is the Employer group number that is known to the health care provider. For example, Union and Non-Union are two different subgroups under a single employer plan with a MCO.	No	Yes	No

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		Tier Type	Tier Type that is associated with this Employer/MCO contract/plan. This value is derived from the same source that provides for the Sub Group Id. For HHPC, the various Tier Types (Value field in LOOKUP) are: 1. "02" 2. "03" 3. "04" 4. "05" 5. "06" 6. "07" 7. "3S" 8. "ME" 9. "MR" 10. "SP" Note that tier types drive what coverage/contract types are allowed for this particular plan - i.e. Single; Family; etc. For example, in the corresponding LOOKUP table, "I" will populate the Short_Desc field; and "Individual" will populate the Long_Desc field.	No	Yes	No
		Open Enroll End Date	Identifies the end date for open enrollment for this particular plan/sub group.	No	No	No
		Open Enroll Start Date	Identifies the start date for open enrollment for this particular plan/sub group.	No	No	No
		Sub Group Effective Date	Identifies the effective date for enrollment allowed by this particular plan/sub group.	No	No	No

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		Sub Group Text	This field will enable a textual description of the associated SubGroupId; if SubGroupId is a pure numeric value. For example, uses SubGroupId values like: 066131000; this represents the Group/Division number.	No	No	No
		Waiting Period Days	Identifies the waiting period that is required by this plan/sub group for the member applicant.	No	No	No
EMPLOYER STAFF	This table identifies what users of the Employer group are allowed access to Web Server via the account setup process.	Employer Key	Unique lookup key that identifies this employer coverage based on a contract number with a MCO.	No	Yes	Yes
		Admin Role	This identifies the particular role that the system allows the Employer group to control what security levels to access what part of the database.	No	Yes	No
		Acct Key	This is unique Key based on Username.	No	No	Yes
		First Name	First Name of Employer group user.	No	No	No
		Last Name	Last name of Employer group user.	No	No	No
		SSN	Social security number to uniquely identify the user.	No	No	No
ACCOUNT	This is account setup information. It will contain username/password and "helpful" hints to login and use secured site.	Acct Key	This is unique Key based on Username.	Yes	Yes	No
		Effective Date	The effective start date that this	No	Yes	No

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			account will be active.			
		Password	Account user's chosen PASSWORD	No	Yes	No
		Username	Account member's chosen USERNAME.	No	Yes	No
		End Date	The effective end date of this HBK account.	No	No	No
		Hint Answer	This is the user's specific answer to the above Hint Question; it should correspond to the user defined question. If the user types in the correct answer, the assigned Password to the Username is displayed; and the user can try login on again.	No	No	No
		Hint Question	This is user defined question that the user can designate as an alternate way of logging into the system. For example: "What's my favorite color?"	No	No	No
		Login Attempt Cnt	This is a counter that reflects the number of times the user is trying to log into the system.	No	No	No
		Modified By	Audit purpose to capture who last modified this record.	No	No	No
		Modified Date	Audit purpose to capture the last modified date of this record.	No	No	No

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		Role Type Cd	This is a place holder attribute for future releases of the system. Role Type can further define a Username within the system into either a Member or Provider role type. For example, a Member who is also a Provider can have the same login Username; role type can differentiate what classification the user wants to be.	No	No	No
		Status	The status of the user login session.	No	No	No
LOOKUP	This is a lookup table for allowable values for a table/column_lookup_key combination in the schema. Note that the foreign key - MCO_Key - is optional in this table; if the set of lookup values is generic across all MCO's, then this field is NULL; otherwise a specific MCO set of lookup values will have field pointing to the specific MCO.	Lookup Key	This uniquely identifies a table/column/value combination.	Yes	Yes	No
		Column Key Name	The column key name for the specified table. For example, the table - MCO_PRODUCT - has a column called Plan_Cd_Lookup_Key. So the Column_Key_Name in this LOOKUP table will be "Plan Cd".	No	Yes	No
		Table Name	The table name in schema.	No	Yes	No

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		Value	Actual value returned for the table/column combination. For example, in MCO_PRODUCT table - for column Plan_Cd - a possible value can be 'IH'; which stands for Integrated HMO Product.	No	Yes	No
		MCO Key	Unique managed care identifier key.	No	No	Yes
		Long Desc		No	No	No
		Seq Num	Allows for ordering of values.	No	No	No
		Short Desc		No	No	No
HOSPITAL AFFILIATION	This table identifies all hospital affiliations associated for this particular provider.	Provider Key	An internal unique provider identifier.	No	Yes	Yes
		Hospital Provider Key	This is internal unique provider key that identifies the hospital as the Organization provider. Look at ORG_INFO table for organization type of a hospital facility.	No	Yes	No
		Primary Affiliation Flg	Future... A 'Y'es or 'N'o indicator; it identifies whether this hospital is the primary facility for this provider to treat patients.	No	No	No
MCO	Managed Care Organization Entity. This is a healthcare organization that is contracting with an Employer Entity; thus providing service to the Employer's employees.	MCO Key	Unique managed care identifier key.	Yes	Yes	No

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		Organization Name	Name of managed care organization.	No	Yes	No
		Logo1 URL	Location of primary MCO graphical logo.	No	No	No
		Logo2 URL	Location of secondary MCO graphical logo.	No	No	No
MCO PRODUCT	This is the list of plans that is provided by a health care organization. Plans and products are synonymous in meaning.	Participation Key	This identifies a specific product that a health care organization will provide for service to any employer groups.	Yes	Yes	No
		MCO Key	Unique managed care identifier key.	No	Yes	Yes
		Plan Cd Lookup Key	Contains the appropriate Lookup Key in LOOKUP table for Plan Cd. See definition of Plan Cd field. This is the plan code or name that is offered by the MCO.	No	Yes	No
		PCP Select Flg	This identifies whether a product requires a PCP selection. Allowable values will be 'Y' or 'N'.	No	No	No
		Plan Detail URL	This points to a web page for the description to this product/plan code.	No	No	No
MCO STAFF	This table identifies what users of the Managed Healthcare group are allowed access to the system via the account setup process.	MCO Key	Unique managed care identifier key.	No	Yes	Yes

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		Admin Role	This identifies the particular role that the system allows the group to control what security levels to access what part of the database.	No	Yes	No
		Acct Key	This is unique Key based on Username.	No	No	Yes
		First Name	First name of this MCO-based user.	No	No	No
		Last Name	Last name of the MCO-based user.	No	No	No
		SSN	Social security number to uniquely identify this MCO-based user.	No	No	No
MEMBER	This table identifies any member.	Member Key	This identifies a unique Member; currently based on Social Security Number and Date-Of-Birth.	Yes	Yes	No
		Birthdate	Date of birth of this member.	No	Yes	No
		First Name	First name of this member.	No	Yes	No
		HBK Acct Flg	This flag condition shows that the member has a username/password account already. It is a Yes/No condition.	No	Yes	No
		Last Name	Last name of this member.	No	Yes	No
		Relation Cd	This field indicates the relationship of member to the primary subscriber of plan. Current Relation Code recognized are: 01 = Self 02 = Spouse 03 = Unmarried child under 19 04 = Unmarried stepchild under 19 05 = Unmarried fulltime student over 19 06 = Handicapped 07 = Ex-	No	No	No

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			Spouse			
		SSN	US-based Social Security Number.	No	Yes	No
		Subscriber Member Key	This identifies a plan's subscriber; the primary and known employee to the employer group. The idea is that dependant member will always point back to the plan's primary subscriber id. If Member Key = Subscriber Member Key, then this record identifies the primary plan member.	No	Yes	No
		Acct Key	This is unique Key based on Username.	No	No	Yes
		COB Flg	A Yes/No flag indicator to identify if this member have the additional COB coverage.	No	No	No
		Gender	This is a single character column; note that this is an optional field: 1. M = Male 2. F = Female	No	No	No
		Hiredate	This is the hiring anniversary date of the member to the employer group that he/she belongs to.	No	No	No

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		Language Cd	The language code that is preferred by this member. For example, 1. AS - American Sign Language 2. CA - Cantonese 3. EN - English 4. IT - Italian 5. SP - Spanish etc.	No	No	No
		Member Num	This is a place holder for a member id/number that can uniquely identify this member to the system. For example, assigned Member# will be used here; i.e. HP12346700 for the subscriber member and HP12346701 for a spouse to this subscriber. Note that this field will be NULL; if a complete new member enrollment. The expectation is that the MCO will assign this member a number once the request goes through the normal business process.	No	No	No
		Middle Name	Middle name of this member.	No	No	No
		Prefix	The relates to what the member wants to be addressed with; i.e. Mr, Ms, Mrs, Dr, etc.	No	No	No
		Student 19 Flg	If member is a student over 19, require additional information. A 'Y'es or 'N'o indication is required.	No	No	No

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		Suffix	This relates to what the member wants to be addressed with at the end of his name; i.e. Paul Williams III - John Smith, ESQ.	No	No	No
MEMBER HISTORY	This entity describes the participation history of a member. It will show the relationship and history of what healthcare plan he has enrolled in all companies that he had worked for.	History Key	This is a unique reference key to a specific member working for a specific employer enrolled in a specific plan for a specific enrollment period. Basically, add Start Date, Coverage Type, Group/Division Id, and Employer Plan Id to the specified list of foreign keys.	Yes	Yes	No
		Employer Plan Key	This uniquely identifies a particular plan that an Employer Group is provider for its employees.	No	Yes	Yes
		Member Key	This identifies a unique Member; currently based on Social Security Number and Date-Of-Birth.	No	Yes	Yes
		Coverage Type Lookup Key	The parameters to LOOKUP table will be based on the type of healthcare coverage that the member is subscribing to: 1. I = Individual, 2. F = Family, 3. etc. Note that the various Coverage Types are different; depending on the Tier Type (in EMPLOYER_PLAN table) that is associated with Plan/Contract/Sub Group Id.	No	Yes	No

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		End Date	Effective end date of this member's participation in healthcare coverage.	No	Yes	No
		Start Date	Effective start date of this member's participation in healthcare coverage.	No	Yes	No
		Member Num	This field is captured for historical purposes only; the data should be read from the active Member Num during this enrollment span. This is a place holder for a member id/number that can uniquely identify this member. For example, assigned Member# will be used here; i.e. HP12346700 for the subscriber member and HP12346701 for a spouse to this subscriber. Note that this field will be NULL; if a complete new member enrollment.	No	No	No
MEMBER STUDENT	If a member is a fulltime student over 19, require information of the school and its city and state.	History Key	This is a unique reference key to a specific member working for a specific employer enrolled in a specific plan for a specific enrollment period. Basically, add Start Date, Coverage Type, Group/Division Id, and Employer Plan Id to the specified list of foreign keys.	No	Yes	Yes
		School City	The City where the school is located.	No	Yes	No

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		School Name	Name of school where the fulltime student is enrolled.	No	Yes	No
		Start Date	Start date of this school of Fulltime Student member.	No	Yes	No
		Graduation Date	The expected graduation date for member from this school.	No	No	No
		School State	The state where the school is located.	No	No	No
		School ZIP	Postal zipcode of school.	No	No	No
		School ZIP Plus4	Long postal zipcode of school.	No	No	No
		Semester End Date	The end date of member's school semester.	No	No	No
		Semester Start Date	The start date of member's school semester.	No	No	No
ORG INFO	This table is only relevant if the Provider in PROVIDER INFO table is identified as an organization provider. Since Organization Provider is a non person; a different set of data is kept; for example, legal corporate name; a tax id; etc.	Provider Key	An internal unique HBK provider identifier.	No	Yes	Yes
		Legal Name	A full legal name of this organization; i.e. Mass. General Hospital.	No	Yes	No
		Type Cd	Future... This type code classifies what organization type is this org. provider; i.e. Facilities - Hospitals; Group Practices; etc.	No	Yes	No
		Site Cd	The Site Cd to identify this organization provider.	No	No	No

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		Tax Id	Future... This is the legal tax identifier for this org. provider.	No	No	No
PHYSICAL ADDRESS	The actual physical addresses that can be associated to anyone or corporation; i.e. Mailing, Home, Work, etc.	Physical Address Key	Unique record identifier of this address.	Yes	Yes	No
		Address Line1	Address line 1 containing the typical information of: 123 Main Street	No	Yes	No
		City	City name of physical address,	No	Yes	No
		Country	A recognized Postal Country Code.	No	Yes	No
		County	County name of physical address.	No	Yes	No
		State	State where physical address is based.	No	Yes	No
		ZIP	US based postal zip code.	No	Yes	No
		Address Line2	Address line 2 containing typical information regarding: P.O. Box; Suite#; Apt#; etc.	No	No	No
		ZIP Plus4	The longer version of US-based postal zip code.	No	No	No
PROVIDER AFFILIATION	This table provides the intersection information of a provider practicing what allowable specialties at a practice site.	Practice Site Key	This key uniquely identifies a practice site for a provider. This practice details the MCO product that is provided by this doctor.	Yes	Yes	No
		Participation Key	This identifies a specific product that a health care organization will provide for service to any employer groups.	No	Yes	Yes
		Provider Key	An internal unique provider identifier.	No	Yes	Yes

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		Provider Num	An provider number recognized by a particular MCO.	No	Yes	No
		Site Cd	A term identifying the Site Code to the group practice that the physician belongs to.	No	Yes	No
		Accept New Flg	A conditional flag (Yes/No) to indicate whether a provider is accepting new patients at this particular practice site.	No	No	No
		AMI Plan Cd	This is a placeholder attribute used by the AMISYS source load group.	No	No	No
		Effective Date	This effective start date for this relationship between MCO and Provider.	No	No	No
		IRS Tax Id	Tags each affiliation with a Tax Id or SSN. This is tied to the how each provider at each site may have a different tax id for claims payment.	No	No	No
		Primary Practice Site Flg	Indicates whether this site is a primary practice site for this provider. FUTURE... This field may belong in SITE SPECIALITY if we need to track primary practice site at a provider's specialty level.	No	No	No

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		Site Review Status	This indicates what the site review status for the provider's specialty at this practice site. FUTURE... This field may belong in the SITE SPECIALTY table if site review is tracked on the specialty level at a practice site for a provider.	No	No	No
		Term Date	The termination date for this relationship between MCO and Provider.	No	No	No
PROVIDER INFO	A table describing the Provider; if a person, then information like SSN; Last and First Name; Gender; etc. This demographics type information is useful to selection by members. Note: if provider is a non-person, then the ORG INFO table will contain equivalent corporate information like: Legal Name; Tax Id; etc.	Provider Key	An internal unique provider identifier.	Yes	Yes	No
		Org Flg	A flag to indicate whether this provider is an individual Clinician/Provider or an organization like: hospital; group practices, etc. A 'Y' condition will force a lookup for name; tax id; site codes in the ORG INFO table.	No	Yes	No
		AMI Provider Num	This is a placeholder attribute used by the AMISYS source load group.	No	No	No

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		Birthdate	Birthdate of this Clinician provider.	No	No	No
		First Name	First name of this Clinician provider.	No	No	No
		Gender	This is a single character column; note that this is an optional field: 1. M = Male 2. F = Female	No	No	No
		Last Name	Last Name of this Clinician provider.	No	No	No
		Logo1 URL	A primary pointer to a graphical logo for this physician provider.	No	No	No
		Logo2 URL	A secondary pointer to a graphical logo for this physician provider.	No	No	No
		Middle Name	Middle name of this Clinician provider.	No	No	No
		SSN	Social Security of a Clinician provider.	No	No	No
PROVIDER LANG	All languages that this provider can communicate with his patients in.	Provider Key	An internal unique HBK provider identifier.	No	Yes	Yes
		Language Cd Lookup Key	Contains the appropriate Lookup Key in HBK_LOOKUP table for Language Cd. See definition of Language Cd field. The language code that this particular provider is fluent in. For example, 1. AS - American Sign Language 2. CA - Cantonese 3. EN - English 4. IT - Italian 5. SP - Spanish etc.	No	Yes	No
PROVIDER SPECIALTY	This table identifies all specialties practiced by this provider.	Prove . Spec Key	Uniquely identifies a specialty code to this provider.	Yes	Yes	No
		Provider Key	An internal unique provider identifier.	No	Yes	Yes

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		Specialty Cd Lookup Key	Contains the appropriate Lookup Key in LOOKUP table for Specialty Cd. See definition of Specialty Cd field. An industry set of specialties that can be practiced by a provider.	No	Yes	No
		Credential Flg	Future... A 'Y'es or 'N'o flag indicating that this specialty requires Credentialing or not.	No	No	No
		PCP Allowed Flg	Future... A 'Y'es or 'N'o indicator identifying whether the specialty allows for PCP designation.	No	No	No
PROVIDER STAFF	This table contains all staff members to a particular provider who requires access to the system via the account setup process.	Provider Key	An internal unique provider identifier.	No	Yes	Yes
		Admin Role	This identifies the particular role that allows a Provider to control what security levels to access what part of the database.	No	Yes	No
		Acct Key	This is unique Key based on Username.	No	No	Yes
		First Name	First name of this Provider group user.	No	No	No
		Last Name	Last Name of Provider group user.	No	No	No
		SSN	Social security number to uniquely identify the user.	No	No	No
SITE SPECIALTY	An intersection table to show a provider's specialties that is practice at a particular site.	Site Specialty Key	A unique identifier based on all of a provider's specialties at this site.	Yes	Yes	No

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		Practice Site Key	This key uniquely identifies a practice site for a provider. This practice details the MCO product that is provided by this doctor.	No	Yes	Yes
		Prov Spec Key	Uniquely identifies a specialty code to this provider.	No	Yes	Yes
STAGING AREA	This table tracks the process of a member through the system for various transaction events; i.e. Enrollment; Profile Change; etc.	Tran Key	This is unique identifier for this particular Staging Area record.	Yes	Yes	No
		Birthdate	Birthdate of this effected member.	No	Yes	No
		Tran Id	This transaction id groups multiple transaction records into a single processing unit. For example, in the enrollment process, the primary subscriber may have 3 dependents. Therefore, the same Tran Id of the 3 dependents is the same as the Tran Key and Tran Id of the subscriber Staging Area table.	No	Yes	No

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		Tran Num	Stage	This identifies a stage to the transaction process of the member of an employer group. For example, the various states for new enrollment transaction type (ENNW) are: "01 = new enrollment submitted by member" "02 = enrollment approved by employer" "03 = enrollment sent successfully to MCO" "06 = enrollment denied by employer" "07 = enrollment failed in delivery to MCO" "08 = enrollment denial exceeds 30 days from initial creation date"	No	Yes	No
		Tran Date	Start	This is the start date/time of transaction process.	No	Yes	No
		Tran Status		The status of this transaction request.	No	Yes	No
		Tran Type		This defines what type of transaction is staged; i.e. enrollment, address change, etc.	No	Yes	No
		Employer Key		Unique lookup key that identifies this employer coverage based on a contract number with a MCO.	No	No	Yes
		MCO Key		Unique managed care identifier key.	No	No	Yes
		Member Key		This identifies a unique Member; currently based on Social Security Number and Date-Of-Birth.	No	No	Yes

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		Practice Site Key	This key uniquely identifies a practice site for a provider. This practice details the MCO product that is provided by this doctor.	No	No	Yes
		Address1	Address Line 1 - i.e. 111 Main Street	No	No	No
		Address2	Address Line 2 - i.e. P.O. Box; Suite Number; etc.	No	No	No
		AMI Division Num	A Division Number for MCO plan in AMISYS. This field and/or AMI Group Number will point to a generic Sub Group Id.	No	No	No
		AMI DOD	Amisys required Date of Death.	No	No	No
		AMI Facility Cd	Amisys specific for HPHC Facility Code.	No	No	No
		AMI Group Num	A Group Number for its MCO plan in AMISYS. This field and/or AMI Division Number will point to a generic Sub Group Id.	No	No	No
		AMI PCP City	Amisys requested city of selected PCP.	No	No	No
		AMI PCP Id	Amisys specific - Provider Id.	No	No	No
		AMI Termdate	Amisys specific Termination date of subscriber/member.	No	No	No
		AMISYS Reject Cd	This field will store the AMISYS rejection code; if this member's record is rejected by the AMISYS system	No	No	No
		City	The city name of the effected member's address.	No	No	No
		COB Birthdate	The birthday of the subscriber to this Coordination of Benefits policy.	No	No	No

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		COB Carrier Name	The carrier insurance company name for this coordination of benefits.	No	No	No
		COB Coverage Type	The coverage type of this policy number of the subscriber to this Coordination of Benefits policy.	No	No	No
		COB Effective Date	The effective date of this policy number of the subscriber to this Coordination of Benefits policy.	No	No	No
		COB First Name	The first name of the subscriber to this Coordination of Benefits policy.	No	No	No
		COB Last Name	The last name of the subscriber to this Coordination of Benefits policy.	No	No	No
		COB Policy Num	The policy number of the subscriber to this Coordination of Benefits policy.	No	No	No
		Country	US postal country code of the effected member's address.	No	No	No
		County	The county name of the effected member's address.	No	No	No
		Coverage Type	This field details the coverage type selected by the subscriber member: 1. individual 2. Family 3. 2-Person ...etc.	No	No	No

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		Coverage Type Lookup Key	The parameters to LOOKUP table will be based on the type of healthcare coverage that the member is subscribing to: 1. I = Individual, 2. F = Family, 3. etc. Note that the various Coverage Types are different; depending on the Tier Type (in EMPLOYER_PLAN table) that is associated with Plan/Contract/Sub Group Id.	No	No	No
		Effective Date	The effective start date of this transaction; i.e. Enrollment date is future-dated. Enrollment process takes place usually 30-60 days before the actual start date.	No	No	No
		Email Address	Email address of member.	No	No	No
		Employer Plan Id	This is the employer plan id; it should uniquely identify the Employer to a Contract Id for a certain SubGroup(Group/Division) that it expect healthcare coverage from a MCO.	No	No	No
		Existing Patient Flg	A 'Y'es or 'N'o flag to indicate whether the member is an existing patient of the selected PCP.	No	No	No
		First Name	First name of the effected member of this transaction.	No	No	No
		Gender	This is a single character column; note that this is an optional field: 1. M = Male 2. F = Female	No	No	No

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		Graduation Date	Expected graduation date of member from school.	No	No	No
		Hiredate	The hiring date of the subscriber member to the Employer group.	No	No	No
		Home Phone Num	Long hand representation of member's home phone number. For example, 800.555.1212	No	No	No
		Language Cd	The language code that is preferred by this member. For example, 1. AS - American Sign Language 2. CA - Cantonese 3. EN - English 4. IT - Italian 5. SP - Spanish ...etc.	No	No	No
		Language Cd Lookup Key	Contains the appropriate Lookup Key in LOOKUP table for Language Cd. See definition of Language Cd field.	No	No	No
		Last Name	Last name of the effected member of this transaction.	No	No	No
		Middle Name	Middle name of the effected member of this transaction.	No	No	No
		Nickname	A nickname to the member's first name.	No	No	No
		Plan Cd	This is the plan code or name that is offered by the MCO.	No	No	No
		Plan Cd Lookup Key	Contains the appropriate Lookup Key in LOOKUP table for Plan Cd. See definition of Plan Cd field.	No	No	No
		Prefix	A prefix to the member's name; i.e. Dr, Mr, Ms, etc.	No	No	No

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		Relation Cd	This field indicates the relationship of member to the primary subscriber of plan. Current Relation Code recognized by HPHC are: 01 = Self 02 = Spouse 03 = Unmarried child under 19 04 = Unmarried stepchild under 19 05 = Unmarried fulltime student over 19 06 = Handicapped 07 = Ex-Spouse	No	No	No
		School City	City code of school that this full time student over 19 is attending.	No	No	No
		School Name	Name of school that this full time student over 19 is attending.	No	No	No
		School State	State code of school that this full time student over 19 is attending.	No	No	No
		School ZIP	Postal zipcode of school.	No	No	No
		School ZIP Plus4	Long postal zipcode of school.	No	No	No
		Selected PCP	Selected PCP for this member; this can be as simple as the provider number.	No	No	No
		Semester End Date	End date of school semester of member.	No	No	No
		Semester Start Date	Start date of school semester for member.	No	No	No
		SSN	Social Security number of this member.	No	No	No
		State	US postal state code of the effected member's address.	No	No	No

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		Student 19 Flg	This flag condition, 'Y'es or 'N'o, indicates whether the member information reflects that of a fulltime student over 19 and under the maximum student age (according to HPHC standard).	No	No	No
		Sub Group Id	This is the Employer group number that is known to the MCO. For example, a company may have a union and non-union subgroups.	No	No	No
		Suffix	A suffix to the member's name; i.e. ESQ, II, etc.	No	No	No
		Tran End Date	This is the start date/time of transaction process.	No	No	No
		Work Phone Num	User can place a Work phone number in this field	No	No	No
		ZIP	US postal zip code of the effected member's address.	No	No	No
		ZIP Plus4	Longer version of US postal zip code of the effected member's address.	No	No	No
STAGING AUDIT	This is an Audit Log for a specific record; it will log the WHO and WHEN and WHY a "Tran Stage Num" is reached within the Staging Area record.	Tran Key	This is unique identifier for this particular Staging Area record.	No	Yes	Yes
		Modified By	The identity of the person updating a Staging transaction record to the new Stage Num; i.e. login user name.	No	Yes	No

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		Modified Date	The date/timestamp to when an update to the Staging transaction record to the new Stage Num.	No	Yes	No
		Tran Stage Num	This identifies a stage to the transaction process of the member of an employer group. Initial release supports: 1. Waiting For Employer Approval 2. successful to Connector Queue. Later releases should support the various stages that enrollment can be; i.e. all information except the PCP is inputted at one time.	No	Yes	No
		Comment	This field can capture any description that is attributed to a change to the stage of an enrollment. For example, the comments tied to a rejection of employee validation its employer.	No	No	No
STAGING DIGITAL ADDR	This table will contain other digital addresses that is related to this particular Staging Area record. For example, the STAGING AREA record contains a home, work, and email address for the primary HOME physical address. This table will allow for additional ones like: Cell, Pager, etc.; or different combinations like a Vacation Home phone	Tran Key	This is unique identifier for this particular Staging Area record.	No	Yes	Yes

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	number.					
		Purpose Cd	This identifies the purpose of this address; such as: "1. PR = Practice Address" "2. HM = Home Address" "3. BL = Billing Address" "4. ML = Mailing Address" "5. WK = Work Address"	No	Yes	No
		Type Cd	This code defined the various types: "1. VC = Voice/Land phone" "2. CL = Cell phone" "3. PG = Pager" "4. EM = Email" "5. WB = Web HomePage"	No	Yes	No
		Value1	Contains initial value associated with a type of digital address. For example - voice mail includes: 800.555.1212 or <u>abc@foobar.com</u> for Email type.	No	Yes	No
		Value2	This may be a second value set to a specific type of digital address. For example - voice mail may include an extension part to the original phone number.	No	No	No

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		Value3	This third value association is for obscure elements like answer back string to a modem connect and/or future electronic requirements.	No	No	No
STAGING PHYSICAL ADDR	This table will contain other physical addresses that is related to this particular Staging Area record. For example, beside the primary Home address in the STAGING AREA record; this member may want to designate other types like: Work, Vacation, Practice, etc.	Tran Key	This is unique identifier for this particular Staging Area record.	No	Yes	Yes
		Address1	Address line 1 containing the typical information of: 123 Main Street	No	Yes	No
		City	City name of physical address,	No	Yes	No
		Country	A recognized Postal Country Code.	No	Yes	No
		County	County name of physical address.	No	Yes	No
		Purpose Cd	This identifies the purpose of this address; such as: "1. PR = Practice Address" "2. HM = Home Address" "3. BL = Billing Address" "4. ML = Mailing Address" "5. WK = Work Address"	No	Yes	No
		State	State where physical address is based.	No	Yes	No
		ZIP	US based postal zip code.	No	Yes	No
		Address2	Address line 2 containing typical information	No	No	No

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			regarding: P.O. Box; Suite#; Apt#; etc.			
		ZIP Plus4	The longer version of US-based postal zip code.	No	No	No

One of ordinary skill in the art will appreciate that the account structure described above and illustrated in Figure 13 enables administrative transactions to be moved across health plans. Thus, as a user moves from one job to another, his or her member history can be taken along. As described above, the account provides a complete member history that is persistent across plan changes, employment changes, family history changes, and the like.

The administrative account allows members the opportunity to review and manage the many aspects of their personal care through a web browser. The account includes a record of the member's healthcare benefits throughout their life. Once enrolled, what was previously disparate data is now meaningful, actionable information. The system allows the user (member/patient/employee) to access their personal healthcare administrative record (e.g., personal profile, out-of-pocket expenses, utilization, etc.) and to use that information to increase their control over their healthcare experience. The account is portable, meaning that it will support a member's move to other employers or other health plans.

The account permits the member to view and update demographic information, insurance elections and medical information. The end user can create an online medical history for themselves and their dependents. The record can then be used to create health history reports for their physicians, schools and other institutions. As described above, the messaging module enables secure Web-based messaging among patients, providers, employers, and the MCO.

The present invention provides significant advantages. For the managed care organization, the enrollment data entry function is offloaded to members, which leads to quicker data entry and faster turnaround. The invention provides more accurate data due to online data entry by a member in a single place. Validation on data entry leads to fewer manual interventions, and lower cost per transaction due to reduced FTEs and reduced equipment costs. The invention provides for greater member loyalty due to ease of member enrollment and re-enrollment. For the member, the invention makes it easier and faster to re-enroll because data has been previously entered. The invention provides the member a greater degree of ownership as the data can be updated as often as necessary, and it provides a faster turnaround time due to elimination of paper. For the employer, there is less burden of processing paper-based forms. More accurate data is provided, and such data is always available via audit trails, activity

reports and roster reports. Employers have lower costs per transaction as the system processes the transaction, not the employer. The invention provides the employers ease of administration when dealing with multiple MCOs. For the

5 healthcare provider, the invention ensures more accurate and up-to-date data, because the member can view and update the data as necessary.

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10 The invention is implemented in a server-side piece of code, as has been described. More generally, the inventive functionality is implemented in software executable in a processor, namely, as a set of instructions (program code) in a code module resident in the random access memory of the computer. Until required by the computer, the set of instructions may be stored in another computer memory, for example, in a hard disk drive, or in a removable memory, or downloaded via the Internet or other computer network.

20 In addition, although the various methods described are conveniently implemented in a general purpose computer selectively activated or reconfigured by software, one of ordinary skill in the art would also recognize that such methods may be carried out in hardware, in firmware, or in more specialized apparatus constructed to perform the required method steps.



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